Europos lyčių lygybės
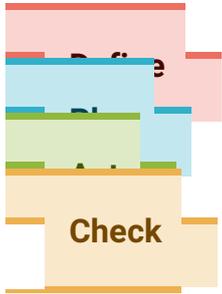institutas

Policy cycle in poverty

Define

Plan

Act

Check

In this phase, it is recommended that information is gathered on the situation of women and men in a particular area. This means looking for sex-disaggregated data and gender statistics, and checking for the existence of studies, programme or project reports, and/or evaluations from previous periods.

> Did you know that EIGE has a Gender Statistics Database? Check whether there are relevant statistics to feed into your analysis.

Examples of gender and poverty and social inclusion statistics

At the EU level, relevant databases and indexes have been developed to address the dimension of poverty. Poverty and income inequality indicators aiming to measure access to resources (income, material deprivation) are based on the assumption of equal sharing of resources within the household. Therefore, those indicators only partially capture the gender dimension of poverty.

> As stated by the European Parliament in the 2011 Resolution on the face of female poverty in the European Union, there is a need to find more appropriate methods of measuring poverty among women (art. 17). This should include the collection of systematic sex-disaggregated data and information (art. 18), and the introduction of new individual indicators in respect of women and poverty as a tool to monitor the impact of broader social, economic and employment policies on women and poverty (art. 19).

The Eurostat statistics on income, social inclusion and living conditions

The Eurostat statistics on income, social inclusion and living conditions cover objective and subjective aspects of income, social inclusion and living conditions in both monetary and non-monetary terms, for households and individuals. They are used to monitor the Europe 2020 strategy, in particular through its poverty reduction headline target. The main source for the compilation of statistics at the EU-28 level is the European Union living conditions survey (EU-SILC). EU-SILC provides cross-sectional and longitudinal information on income, poverty, social exclusion and living conditions, disaggregated by sex, age, nationality, education level, activity status and type of household. This instrument is the main source for comparable annual data on the level of composition of poverty and inequality in the EU.

The survey is divided into 5 main sections:

(a)   The 'Income and living conditions' section covers 4 topics: people at risk of poverty or social exclusion, income distribution and monetary poverty, living conditions and material deprivation, which are again structured into collections of indicators on specific topics.

(b)   The 'People at risk of poverty or social exclusion' section includes the main indicators on risk of poverty or social inclusion.

(c)   The 'Income distribution and monetary poverty' section provides indicators relating to monetary poverty for all and elderly people, in-work poverty and distribution of income.

(d)   The 'Living conditions' section hosts indicators relating to characteristics and living conditions of households, characteristics of the population according to different breakdowns, health and labour conditions, housing conditions as well as childcare-related indicators.

The 'Material deprivation' section covers indicators relating to material deprivation, economic strain, durables, housing deprivation and environment of the dwelling.

Recent modules have explored issues such as banking exclusion and social participation, as well as access to social benefits, housing, public services and facilities. The longitudinal dimension of the EU-SILC survey can also help when assessing the relations between labour market transitions and poverty dynamics, as well as for assessing the persistence of poverty.

Data and indicators are available on the [Eurostat database on income, social inclusion and living conditions](#).

The EU Structure of Earnings Survey (SES)

The EU Structure of Earnings Survey (SES) is the basis for collecting data on earnings and the gender pay gap in EU-28 Member States. It provides comparable information at EU level on relationships between the level of earnings, individual characteristics of employees (sex, age, occupation, length of service, educational level) and their employer (economic activity, size of the enterprise). The data collection is based on legislation and data becomes available approximately 2 years after the end of the reference period.

Earnings statistics vary with regard to how frequently the data is collected (biannually, annually, once every 4 years), coverage (economic activity, enterprise size) and units of measurement (hourly, monthly or yearly earnings). In particular, SES provides information on annual gross earnings, net earnings and tax rates, gender pay gap and minimum wages. Data are broken down by:

economic activity (NACE: Statistical Classification of Economic Activities in the European Community)
form of economic and financial control (public/private) of the enterprise and age ranges of employees.

Data and indicators are included in Eurostat's earnings database.

The European Union Labour Force Survey (EU-LFS)

The European Union Labour Force Survey (EU-LFS) provides the main aggregated statistics on labour market outcomes in the European Union. The EU-LFS is the main data source for employment and unemployment. Tables on population, employment, working hours, job permanency and professional status are included. It provides disaggregated statistics by sex, age groups, economic activity, educational attainment and field of education, from which it is possible to measure the characteristics of the labour force of women, by age and activity status. Starting from 1999, every year the survey has included an ad hoc module on specific topics. In 2005 and 2010, the module was on reconciliation of work and family life.

Examples of studies, research and reports

Joseph Rowntree Foundation, Poverty through a gender lens: Evidence and policy review on gender and poverty, Bennett F., and Daly M. for the Joseph Rowntree Foundation. 2014.

[This review](#) forms part of the Joseph Rowntree Foundation's programme to develop a set of evidence-based anti-poverty strategies for the UK. The remit was to identify and analyse evidence on the links between gender and poverty, and possible reasons for them, and to examine the impact of these links on specific policies and overall policy approaches. On the basis of the findings, the review was to make recommendations for gender-oriented measures to prevent and tackle poverty linked to gender and highlight any gaps in the evidence base.

European Community of Practice on Gender Mainstreaming, Poverty, social inclusion and gender in the European Social Fund, 2014.

[This is the final report](#) of the working group of the European Community of practice on gender mainstreaming. The report tackles the issue of the integration of the gender dimension into the European Social Fund (ESF) programmes (2014 – 2020) in relation to the EU 2020 strategy. This report identifies the gendered dimensions of poverty, provides policy recommendations, good practices and indicators to monitor women living in poverty resulting from the economic crisis, especially in the form of in-work poverty.

EIGE, Gender Equality Index, Measuring gender equality in the European Union 2005 –2012, 2015.

[The Gender Equality Index](#) provides a comprehensive measure of gender equality, tailored to fit the EU policy context. The present update includes scores for 2005, 2010 and 2012, for the first time allowing for an assessment of the progress made in the pursuit of gender equality in the European Union and individual Member States over time. Moreover, the present update makes a first attempt at populating the satellite domain of violence.

European Commission paper, Lone parents and employment in Europe, 2014.

[This paper](#) examines the key characteristics of lone parents through descriptive and comparative perspectives. This short statistical report is part of a series of reports on gender equality in the workforce and the reconciliation of work, family and private life. These reports have been commissioned by the Directorate-General for Justice of the European Commission.

European Commission report, The impact of the economic crisis on the situation of women and men and on gender equality policies, 2013.

[The report aims](#) to assess the impact of the economic crisis on the situation of women and men in Europe and on gender equality policies. This is important as economic crises are deeply gendered. This report is a product of the EGGE and the EGGSI expert networks of the European Commission. It covers 27 Member States, the EEA-EFTA countries and 3 candidate countries: Turkey, Croatia and FYROM. The core reference period for analysis of the labour market impact is the (nearly) 4 years between the second quarter of 2008 – when the crisis technically started for the EU as a whole – and the first quarter of 2012, the latest quarter for which Eurostat data is available at the time of writing. Analysis of the social impact extends over the period between 2005 and 2010.

European Commission report, Gender mainstreaming active inclusion policies, 2010.

The aim of this [report](#) is to inform and help develop gender mainstreaming in active inclusion policies. The report reviews gender differences and inequalities in the risks of poverty and social exclusion and it provides a close look at the connections between active inclusion policies and gender equality strategies. It then analyses examples of concrete gender mainstreaming in each of the 3 pillars of active inclusion, i.e. income support, labour inclusion and access to services.

> Did you know that EIGE has a resource and documentation centre? Check whether there is relevant information to feed into your analysis.

One of the first steps to take when defining your policy/project/programme is to gather information and analyse the situation of women and men in the respective policy area. The information and data you collect will allow an understanding of the reality and assist you in designing your policy, programme or project. Specific methods that can be used in this phase are gender analysis and gender impact assessment.

Examples of gender analysis

European Commission, Manual for gender mainstreaming: employment, social inclusion and social protection policies, 2008.

This manual provides both an easy to understand explanation of what gender mainstreaming is, and practical, hands-on advice to policymakers on how to implement it in employment, social inclusion and social protection policies. The manual offers a four-step method, which can be easily followed by policymakers: getting organised, learning about gender differences, assessing the policy impact and redesigning policy. A specific section is dedicated to poverty and social exclusion.

Examples of gender impact assessment

Irish Government, Poverty impact assessment of the one parent family payment review, 2006.

This assessment presents the necessary resources to carry out a full impact assessment of the one parent family payment scheme. Guiding questions are proposed within different steps to be followed. The assessment has a particular relevance with regard to gender and family status, with nearly all recipients of the benefit being women.

Integrating gender into poverty and social impact analysis

The World Bank, Social Development Department & Gender and Development Group, 2013.

This document provides practical guidance on how to incorporate a gender lens in poverty and social impact analysis (PSIA), which is an analytical approach used to assess the distributional and social impacts of policy reforms on different groups.

Examples of stakeholders that can be consulted

Consider consulting stakeholders (e.g. gender experts, civil society organisations) on the topic at hand, to share and validate your findings and to improve your policy or programme proposal. This will enhance the learning process on the subject for all those involved and will improve the quality of the work done at the EU level.

European Women's Lobby (EWL)

[The European Women's Lobby](#), among its several working areas, includes one on women's economic independence covering important aspects related to women's poverty. In 2014, the EWL launched its report 1995 – 2015: From words to action, which assesses the implementation of the Beijing Platform for Action in Europe 20 years after its adoption by the international community focusing also on BPfA Area of Concern A: Women and Poverty.

European Platform Against Poverty and Social Exclusion

The European Platform Against Poverty and Social Exclusion is one of 7 flagship initiatives of the Europe 2020 strategy for smart, sustainable and inclusive growth. It is designed to help EU countries reach the headline target of lifting 20 million people out of poverty and social exclusion. Gender issues are covered within the European platform against poverty activities considering that (i) women's poverty and social exclusion is a multifaceted problem; (ii) unemployment is the main cause of poverty, which particularly affects women; (iii) the gender income gap leads to higher rates of poverty in the female population both in work and out of work.

Read more about the platform [here](#)

Oxfam

[Oxfam](#) is an international confederation of 17 organisations working together with partners and local communities in more than 90 countries, alongside vulnerable women and men to end the injustices that cause poverty.

For a more detailed description of how gender can be mainstreamed in this phase of the policy cycle, click [here](#).

In this phase, it's appropriate to analyse budgets from a gender perspective. Gender budgeting is used to identify how budget allocations contribute to promoting gender equality. Gender budgeting brings visibility to how much public money is spent for women and men respectively. Thus, gender budgeting ensures that public funds are fairly distributed between women and men. It also contributes to accountability and transparency about how public funds are being spent.

Example of gender budgeting in poverty and social exclusion

Gender budgets

The experience of the [UK's Women's Budget Group](#), is a paper that starts by defining what a gender budget is, outlines the imperatives to conduct a gender budget and then proceeds to detail how such a budget may be constructed. This methodology was applied to UK budgets, also covering policies tackling poverty and social exclusion.

Examples of indicators for monitoring gender and poverty and social inclusion

When planning, do not forget to establish monitoring and evaluation systems and indicators that will allow the measurement and comparison of the impact of the policy or programme on women and men over the timeframe of its implementation. Remember to define the appropriate time to monitor and evaluate your policy.

EU [Social Indicators](#)

At risk of poverty or social exclusion rate

- [At risk of poverty or social exclusion rate](#) : This indicator corresponds to the sum of persons who are at risk of poverty, or severely materially deprived, or living in households with very low work intensity as a share of the total population, expressed in numbers or shares of the population. Components:

- At risk of poverty rate: Share of persons aged 0+ with an equivalised disposable income below 60% of the national equivalised median income. Equivalised median income is defined as the household's total disposable income divided by its 'equivalent size', to take account of the size and composition of the household, and is attributed to each household member. Equivalization is made on the basis of the OECD modified scale.

- Population living in very low intensity (quasi-jobless) households: People aged 0 – 59, living in households, where working age adults (18 – 59) work less than 20% of their total work potential during the past year.

- Severe material deprivation rate: Share of population living in households lacking at least 4 out of the following 9 items: i) to pay rent or utility bills, ii) keep home adequately warm, iii) face unexpected expenses, iv) eat meat, fish or a protein equivalent every second day, v) a week holiday away from home, or could not afford

(even if wanted to) vi) a car, vii) a washing machine, viii) a colour TV, or ix) a telephone.

The indicator is one of the most relevant indicators at the EU-28 level for measuring the at-risk-of-poverty situation, although not disaggregated by sex. Nevertheless, disaggregation by sex and age is available.

Currently 16.6% of the EU-28 citizens are at risk of poverty and all over Europe women are at higher risk of falling into poverty than men (17.2% and 16.1% respectively in 2013). The indicator is included in the set of indictors for monitoring Area A – women and poverty, in the BPfA. The indicator is available from the European Union Living Conditions Survey (EU-SILC), included in the Eurostat income and living conditions data (online data code: ilc_li02).

Access the data here

A3a. Inactivity by age and sex; share of women and men who are inactive by age

A3b. Inactivity by age and sex; share of inactive women and men who are not looking for a job for family care reasons.

This second indicator is a factor (i.e. causal) indicator of poverty. Employment is perceived by many Member States as a key factor of social inclusion and offers the most important means of escaping the poverty cycle. Being employed and earning wages is crucial for the economic independence of women and men; therefore, those events that may lead women and men of working age to interrupt their working lives or not to participate in the labour market can generate a potential risk of poverty. The responsibility for family care still falls mainly on women, in part due to social stereotypes regarding women's and men's roles in the family and society. Due to gender imbalances, the interruption of working life or inactivity for family care reasons can act as women-specific factors that may generate a loss of economic independence and, later in the life cycle, a lower level of social protection (lower pensions).

Inactivity has been defined as the percentage of persons, who are classified neither as employed nor as unemployed in the labour market. Employed persons are all persons who worked at least one hour for pay or profit during the reference week or were temporarily absent from such work. Unemployed persons are all persons who were not employed during the reference week and had actively sought work during the past 4 weeks and were ready to begin working immediately within 2 weeks. Inactivity does not, however, mean that persons who are in this category are inactive in general. They can, for example, be taking care of children or incapacitated adults, doing domestic work or studying.

Not looking for a job for family care or personal reasons is the share of persons who are outside the labour market and not looking for work due to family or personal reasons and caring for children or incapacitated adults.

The reason for inactivity captured by this variable deals with the main reason why somebody is not seeking employment. It has to be noted that in some cases, the main reason may not be the only reason for not looking for a job. In addition, the reasons for not looking for a job for family care and personal reasons are presented separately.

The indicator is included in the set of indicators for monitoring area A – women and poverty in the BPfA, as employment is considered a key factor of social inclusion and offers the most important means of escaping the poverty cycle. Being employed and earning wages is crucial for the economic independence of women and men. Therefore certain events that may lead women and men of working age to interrupt their working lives or not to participate in the labour market can generate a potential risk of poverty. In 2014, the inactivity rate in the EU-28 was 27.7%. Women are however, particularly affected, with an inactivity rate of 33.5% compared to 21.9% for men.

The indicator is available from Eurostat EU-LFS Survey, included in the Eurostat Labour Market database (online data code: lfsa_ipga).

Access the data here

At risk of poverty rate by type of household and sex

This indicator is a 'classical' poverty measure defined as the percentage of people living below the monetary poverty line but it emphasises household attributes that have a particular impact on poverty among women, such as lone parenthood and household size. The number of lone parents has been increasing across the EU and the data shows they face a particular risk of poverty. Many lone parents are the sole carers of their children and are restricted to jobs with hours that enable them to spend as much time with their children as possible. The gap between the income of lone-parent families headed by women (25.1%) and men (24.6%) is low but can highlight the vulnerability to poverty of lone parents, on the one hand, and of women on the other.

The indicator is included in the set of indictors for monitoring the area A – women and poverty by the BpfA ([9]). The indicator is available from the European Union living conditions survey (EU-SILC), included in the Eurostat income and living conditions data (online data code: ilc_li03).

Access the data here.

n-work-at-risk-of-poverty rate by sex

The indicators are calculated as the share of people aged 18 or over with an equalised disposable income below the risk of poverty threshold, which is set at 60% of the national median equalised disposable income (after social transfers) over the total population. The indicator is strictly related to in-work poverty and is sensitive to the interconnection between low pay and low work intensity at the household level. The indicator is a relevant indicator for monitoring the risk of poverty of people and families with low work intensity, and it is already included among the social inclusion and social policy indicators used at the EU-28 level.

Disaggregation by sex and age is available. The in-work-at-risk-of-poverty rate indicates to what extent employment helps people to overcome the risk of poverty. In general, men were more affected by in-work poverty than women (9.3% compared with 8.4% in 2013). The situation is the opposite for young workers aged 18 to 24 years. In this case, women were more affected (12.5% compared with 10.7%).

The indicator is available from the European Union living conditions survey (EU-SILC), included in the Eurostat income and living conditions data (online data code: ilc_iw01).

Access the data here.

Mean monthly earnings by sex

Mean monthly earnings represent the earnings of an employed person, before any tax deductions and social security contributions, payable by wage earners and retained by the employer. These are restricted to gross earnings which are paid in each pay period during the reference month. It is also considered in the calculation of the EIGE gender equality index under the money domain. With a gender gap in earnings of 510 pp, gender differences in mean monthly earnings on average were small for the EU-27 in 2012.

It is a calculation based on the structure of earnings survey (SES) (online data code: earn_ses10_20). Access the data here.

Income quintile share ratio by sex

This is the ratio of total income received by 20% of the population with the highest income (top quintile) to that received by 20% of the population with the lowest income (lowest quintile). Income is defined as equalised disposable income. The income quintile share ratio (also called the S80/S20 ratio) is a measure of the inequality of income distribution. It is disaggregated by women and men and is also considered in the calculation of the EIGE gender equality index under the money domain. In 2012, gender differences in income distribution were small, reflected in a gender gap of 0.8 pp.

The indicator is available from the European Union living conditions survey (EU-SILC), included in the Eurostat income and living conditions data (online data code: ilc_di11).

Access the data here.

Gender pay gap

The unadjusted gender pay gap (GPG) represents the difference between average gross hourly earnings of male paid employees and female paid employees as a percentage of average gross hourly earnings of male paid employees. The population consists of all paid employees in enterprises with 10 employees or more in NACE Rev. 2 aggregate B to S (excluding O). The GPG is an important indicator used within the European employment strategy (EES) to monitor imbalances in wages between women and men. It gives an overall picture of gender inequalities in terms of pay and measures a concept that is broader than the concept underlying the principle of equal pay for equal work. Unequal pay persists as a major problem: women earned 16.4% less on average for equal work than men in the EU-28 in 2013. Eurostat collects the structural indicator gender pay gap (GPG) in unadjusted form on an annual basis. From reference year 2006 onwards, the new GPG data is based on the methodology of the structure of earnings survey (SES) carried out with a four-yearly periodicity. It is included in the Eurostat earnings data (online data code: earn_gr_gpgr2).

Access the data here.

The gender gap in pensions

The gender gap in pensions can be identified as the sum of gender inequalities over a lifetime, including differences in the life course (motherhood penalty ([12])), segregated labour market and gendered social norms and stereotypes. The gender gap in pensions is defined as a percentage by which women's average pension is lower than men's. It is computed in the following way: one minus women's average income divided by men's average income and multiplied by 100 to express the ratio as a percentage. The methodology for calculating the gender gap in pensions is based on the methodology used and described in the report 'The gender gap in pensions in the EU' ([13]). The gender gap in pensions throughout the European Union (EU) is considerable. In 2012, the gender gap in pensions amounted to 38% in the EU on average ([14]). The major source of statistics on income that can be used to calculate gender gap in pensions is the European Union living conditions survey (EU-SILC).

For a more detailed description of how gender can be mainstreamed in this phase of the policy cycle, click here.

In the implementation phase of a policy or programme, ensure that all who are involved are sufficiently aware about the relevant gender objectives and plans. If not, set up briefings and capacity-building initiatives according to staff needs. Think about researchers, proposal evaluators, monitoring and evaluation experts, scientific officers, programme committee members, etc.

Examples of capacity-building initiatives about gender and poverty and social inclusion

The ITC International Training Centre gender, poverty and employment course

Based on the ILO 'gender poverty and employment' approach, the [ITC International Training Centre gender, poverty and employment course](#) provides information, analysis and strategies for poverty reduction through decent work for women and men. It gives a better understanding of the dimensions of poverty, and formulates gender-sensitive strategies to address them. It is composed of different training modules available online. Access the course here:

Example of gendered language in poverty and social exclusion

Elaine Chase and Grac Bantebya-Kyomuhendo (eds.) Poverty and Shame: Global experience, Oxford University Press, 2015.

This book presents cultural conceptions on issues related to the way poverty is presented and conceived. A specific chapter is focused on the role of media in the construction of poverty with insights and several examples on women and poverty.

Access the book [here](#).

For a more detailed description of how gender can be mainstreamed in this phase of the policy cycle, click [here](#).

A policy cycle or programme should be checked both during – monitoring, and at the end – evaluation, of its implementation.

Monitoring the ongoing work allows for a follow-up of progress and remedying possibly unforeseen difficulties. This process should take into account the indicators delineated in the planning phase and realign data collection based on those indicators.

At the end of a policy cycle or programme, a gender-sensitive evaluation should take place. Make your evaluation publicly accessible and strategically disseminate its results to promote its learning potential.

Example of a gender monitoring and evaluating poverty and social inclusion

The evaluation of the ReGender project, a key part of Oxfam's UK poverty programme, provides an excellent methodology for conducting a gender evaluation in this sector.

Read more about it here

> For a more detailed description of how gender can be mainstreamed in this phase of the policy cycle, click here.